



ACC 261-1—Communications for Professional Accountants

Winter 2023 Syllabus (Discussion Draft Only)

Mondays from 9:00AM to 1:00PM

DISCLAIMER: This syllabus and the schedule of readings, assignments, and activities may be changed to maximize student learning needs and meet the course objectives.

Effective communication skills are critical to professional success. "This is really the ability to clearly articulate your point of view and the ability to create a connection through communication." Holly Paul, PriceWaterhouseCoopers

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Office Hours: Mondays from 1:30 to 2:30 or by Appointment Please email me to schedule an appointment.

Canvas: Students are required to have access to Canvas throughout the course. Regular course updates, information and schedules are posted to Canvas. Grades are posted through the Canvas gradebook.

Teaching Assistant: TBA

Required Texts and Preparation Materials:

- Text: No Textbook. Assigned reading in Canvas through Study.net
- Harvard Business Review Simulation Course Pack; details to be provided on Canvas regarding this purchase.
- Ethics Game Writing Simulations; details to be provided on Canvas regarding this purchase. <https://www.ethicsgame.com/exec/site/index.html>

Please purchase the materials above prior to the first day of class. On Canvas and within this syllabus you will hyperlinks that guide you to additional readings and videos.

Google "Purdue Owl" to reach the online Purdue Owl Language Lab; add this to your toolbar. It offers immediate consultation on grammar, spelling and more, and is especially valuable to ESL students or those whose writing skills have not been fully developed and/or are rusty. [link]

Course Overview and Learning Goals

A key component to the accounting professional's success lies in their ability to communicate effectively in a way that provides clarity and influences decision-making. This is true regardless of where you ultimately land professionally, e.g. in a Big 4, national, regional or local firm, industry or government, to list a few. In this course we examine communication as a strategic tool that will be vital for your future success. Moving beyond simply teaching public speaking or business writing, my goal for this course to help you achieve *writing and speaking skills* in a way that places you and your audience on the same frequency, enabling you to be effective and influential. We will also place an emphasis on structuring and documenting audit workpapers and reports, understanding your audiences (investors, creditors, regulators, and other stakeholders), and consideration of ethical and regulatory responsibilities.

Course Design

To achieve these somewhat ambitious goals this course designed the course with two modules discussion and practical work on each Monday. You can expect the entire four-hour block to be interactive and engaging. To get the most benefit please come to class each week prepared and ready to engage with the professor and your peers. This course will enable you to develop professional communications skills for your upcoming career. You'll find numerous opportunities to express yourself in both writing and oral presentations. You'll also take a step forward in your powers of critical analysis, applying a critical thinking protocol.

Presentations

A competent speaker brings a foundation of eight basic skills to a presentation. Students enter this class with some of these speaking skills, but others need to be learned. For instance, some students speak too quickly (and usually know it) because they're nervous. A coaching technique based on cognitive restructuring rapidly enables students to speak in presentations at an ideal tempo. You will also learn more advanced skills, such as having a commanding, confident presence. PowerPoint training will be folded in as well.

Writing

Initial writing skills typically vary greatly within the class. The Writing Staircase is a series of six skill exercises. These enable everyone to advance their skill level. Actual business writing is often reviewed in class. Your writing challenges will often involve real or simulated business situations and case studies. You'll also create two situational memos similar to those in the BEC section of the CPA exam. Yes, it's a requirement for the CPA exam, so let's do this!!

Critical Analysis Series

This component will enhance your ability to analyze business matters dispassionately and thoroughly. It is a collection of readings, exercises, and other challenges, chosen with an eye toward your future needs in the accounting field. What does it include? A protocol from the Foundation for Critical Thinking provides a helpful structure for analyzing complex matters. Insights from Nobel Laureate Daniel Kahneman will provide a real-world way of discussing

how we think...and often don't. Numbers can mislead, so you will delve into bias, poor logic, and other challenges to sound analysis.

Required Materials

A downloadable **TEXTPAK**, accessible in study.net. One Harvard streaming simulation will also be incorporated in your materials.

I will also post, periodically, materials for you to read, view, and/or analyze prior to the session in which we will discuss it.

Recommendation

Google "Purdue Owl" to reach the online Purdue Owl Language Lab; add this to your toolbar. It offers immediate consultation on grammar, spelling and more, and is especially valuable to ESL students.

I am a prolific Announcement "poster." So, please keep an eye on Canvas and your email (assuming you have pushed Canvas announcements to your email).

Your Guide to Course Communication

- **Sensitive, personal, or confidential matters** should be directed to my email address—or, of course, speak with me via phone or on a Zoom appointment. There are set office hours, but I also can, at your request, often arrange customized times that fit both of our schedules.
- **Grades** will be posted in **Gradebook** on Canvas. Approximately 1) 40% of your grade is allocated between your various individual and team presentations; 2) 40% of your grade is allocated between your various individual and team written submissions; and 3) 20% of your grade is allocated to attendance, participation, and contribution (see below) (including peer review/assessments of your contributions).
- **The weekly assignments** can be found on the Syllabus and Assignments pages within Canvas. All written assignments are due on time, but dates could change (perhaps be pushed out due to guest speakers or other circumstances). At my discretion, I may deduct points for significant or repeated tardy submissions.
- **Student discussion groups** will analyze cases and take on other tasks including leading an informal discussion of assigned material. Discussion group members will be assigned in the week of class. At the end of the quarter, group members submit peer evaluations that factor into participation grades about the team's members.

Weekly Session Class Plan (tentative and subject to change based on class needs)

Date	Topic	Prep Work/Due Dates
1/9	<p>Syllabus Review and Questions</p> <p>Overview of Communication: Verbal, Non-Verbal, Active Listening, and Writing</p> <p>Discussion of Amy Cuddy: Your body language may shape who you are (TedTalk)</p>	<p>Purchase text, assigned reading</p> <p>Submit Personal Communication Assessment Baseline Memorandum (due 1/14)</p> <p>Submit your prior ELI (Ethics Game Certificate of Completion (1/15))</p> <p>Begin Grammar Quiz (Canvas) — due with passing score by week 5 (1/30)—unlimited attempts</p>
1/16	<p>Fundamentals of Oral Communication; The Elevator Speech/Pitch;</p> <p>Individual brief oral presentations/elevator “pitches” begin (no slides or visual aids) (weeks two and three); Peer review and feedback—individual brief presentations;</p> <p>Team Discussion and Presentation Groups assigned (approximately 2-3 students per team)</p>	<p>Reading assigned in Canvas</p> <p>Prepare 2-to-3-minute talk about yourself</p>
1/23	<p>Fundamentals of Inter-Office Written Communications;</p> <p>Creating compelling business documents; Business Environment and Concepts;</p> <p>Discussion of TedTalk—Death By PowerPoint; Persuasive Writing;</p> <p>Individual brief oral presentations continue; Peer review/feedback—individual brief presentations cont.;</p>	<p>Reading assigned in Canvas</p> <p>Submit Persuasive Memo (1/28); Submit self-critique re brief oral presentation (1/28)</p>
1/30	<p>Strategic Storytelling;</p> <p>Each student will build and present a persuasive argument about an attention-getting business policy or practice (student’s choice) (three slides maximum);</p> <p>Fallacies and biases that influence judgment;</p>	<p>Reading assigned in Canvas</p> <p>Submit slides prior to class</p> <p>Bring three paper copies of Business Memo to class (format:</p>

	Peer review/feedback—persuasive argument; Peer review/feedback—Business Memo (BEC format)	similar to the Business Environment and Concepts portion of the CPA exam Last date to submit completed grammar quiz with passing score (1/30) Submit self-critique re persuasive argument presentation (2/4)
2/6	Guest Speaker—Straight Talk—Cynthia Pon (COO Macias, Gini & O’Connell); Storytelling with Data Giving Voice to Values (GVV); GVV Role Play Workshop/Coaching; Baird Decision Making Model workshop;	Reading assigned in Canvas —Material for Storytelling with Data, GVV and Ethical Decision-Making Workshops Submit final BEC modeled business memo (2/12)
2/13	Individual presentations using a single slide for enhancement, one that involves data visualization. Short impromptu group facilitated class discussion of case study (continued)	Submit slide prior to class Submit Assessment/Peer review report of two student data visualization presentations—assigned in Canvas (2/18) Submit Ethics Game Simulation A and Memo re related dilemma and recommendations (2/19)
2/20	Delivering Bad News; Presentation topic selection and planning workshop (Topic: informative and interesting case study (must in part employ data visualization) Agendas, Minutes, MOUs, Values and Mission Statements Debrief Ethics Game Simulation A Memo;	Reading assigned in Canvas Submit “bad news” letter to client (2/25) Submit “bad news” interoffice memo (2/25) Submit Team Values Statement (2/26); Submit Team Mission Statement (2/26)
2/27	Mount Everest Collaboration Simulation; Debrief Agendas, Minutes, MOUs	Reading assigned in Canvas Submit Team Meeting Agendas (2) (3/5)

	Team workshop; Coaching sessions for final team presentations	Submit Team Memorandum of Understanding (3/5)
3/6	Final Team Presentations on an informative and interesting case study or controversy/scandal in the news related to accountancy/accounting firm etc.	Submit Ethics Game Simulation B and Memo re Accountancy related dilemma and recommendations (3/12) All Team presentation materials and visual aids (e.g. PPT and handouts) due on 3/6 (before class)
3/13	Final team presentations continue and review exercise; A challenge from the CPA exam's BEC section will end the class, with a limited amount of time to write an answer to a prompt.	Turn in your final BEC format memo at the end of the challenge Peer assessments of discussion group members

Attendance, Participation, and Contribution Factors: Without question this will be a highly interactive course. In fact, it's designed to be more about your learning than my teaching. To get the most out of it, you need to attend all of the class sessions. But attendance is only the first step—while here you must participate. I would hope you not simply participate (e.g. speak in class) but will also truly contribute by helping further class discussions and contribute to the learning of others. Anything I ask you to do which doesn't specifically have a grade associated with it is considered a portion of your participation grade. I will use a mix of cold calls, warm calls, and volunteers to aid discussion

It is best to avoid missing class. But if you choose to miss class (or a portion of class), I urge you to do so with the least amount of impact on your learning experience. The further in advance you notify me and the TA of your need to be absent, the less impact any absence will have. One pre-notified absence (48 hours or more in advance) will have no impact on your participation grade; a second absence will have a more pronounced impact.

If you must arrive late, do so with the least amount of interruption. If I am speaking, slip in quietly. If a guest speaker or a peer is presenting, wait outside the classroom until there is a logical break (e.g., applause) before entering. Laptops are rarely needed in this class. I will notify you in advance if they are necessary; otherwise, leave laptops closed during class. Cell phones, pagers, iPhones, buzz saws, and other distracting electronic devices fall into this same category.

Please keep name placards visible during at least the first few classes and whenever we have guests.

Feedback and Grading in this Course: You will quickly begin to see that I love being able to provide feedback on your communication, but am less enthusiastic about having to place a numeric score on your efforts. Yet, I recognize that in a university of UCD's caliber both components are needed. I do my best to provide a clear rubric for what's expected on each graded assignment. I grade you on how well you meet the factors of the rubric, not "how good of a speaker/writer you are" or "how much I liked what you delivered/wrote." When grades are assigned by the TA or grader, they are working on my instruction with the rubric provided.

Rights and Responsibilities: All participants in this course are expected to follow the UC Davis Principles of Community, which includes affirmation of the right of freedom of expression and rejection of discrimination. The right to express points-of-view without fear of retaliation or censorship is a cornerstone of academic freedom. A diversity of opinions with respectful disagreement and informed debate enriches learning. However, in this course, any expression or disagreement should adhere to the obligations we have toward each other to build and maintain a climate of mutual respect and caring.

Students are expected to abide by the University of California-Davis Code of Conduct found at <http://sja.ucdavis.edu/cac.html> . The Code of Conduct has explicit explanations of violations (e.g. plagiarism, cheating, unauthorized collaboration, etc.). Academic conduct violations will not be tolerated, and your instructor will not hesitate to turn violators over to Student Judicial Affairs. If you are uncertain about what constitutes an academic conduct violation, please refer to the code link or contact your instructor. There may be times where I will allow you to re-purpose your own material for a presentation or written assignment in this course, but we must know about this in advance of the assignment being submitted. Regardless, all work you submit must be original for this course or clear in its origination. If you have a question about an honor code issue the time to raise it is while you are preparing an assignment, not after. All material in the course that is not otherwise subject to copyright is the copyright of the course instructor and should be considered the instructor's intellectual property. Therefore, it is a violation of the Code of Conduct to post materials on other websites.

Accommodations: UC Davis is committed to educational equity in the academic setting, and in serving a diverse student body. If you are a student who requires academic accommodations, please contact the Student Disability Center (SDC) directly at sdc@ucdavis.edu or 530-752-3184. If you receive an SDC Letter of Accommodation, submit it to your instructor for each course as soon as possible, at least within the first two weeks of a course.

Safety and Emergency Preparedness: UC Davis has many resources to help in case of emergency or crisis. While reviewing campus Emergency Information, you may want to register for UC Davis Warn Me and Aggie Alert, which will give you timely information and instructions about emergencies and situations on campus that affect your safety. If there is an emergency in the classroom, please follow my instructions.

Student Wellness: You are encouraged to practice self-care so that you can remain focused and engaged, which might mean getting a drink of water or leaving to use the restroom. Please be

respectful of others by minimizing distractions when practicing self-care. Graduate education can be overwhelming at times but know that you are not alone if you're feeling stressed. Please reach out for support if you need it. You can visit Virtual UC Davis to find resources related to health and well-being, academics, basic needs (food and housing) and more.

Now, together let's take the elephant down one bite at a time...